



Expanding the circle
of compassionate care
LET'S BUILD THE NEW DUNDAS MANOR.



How to Make a Gift of Mutual Funds

If you hold mutual funds in an account with a major brokerage firm, or if they are held in connection with a mutual fund broker/dealer, you may have your mutual funds transferred to the WDMH Foundation through our account with RBC Dominion Securities (see below, [Letter of Intent, FORM 2](#)).

Donations of mutual funds take longer to process than gifts of stocks due to the additional steps needed to transfer ownership. The fund company may require you to sign a fund company disclaimer. Contact your broker/dealer to obtain the required form for your signature.

LETTER OF INTENT, FORM 2

Direction to Transfer Mutual Fund Securities In-Kind Electronically for Donation

Contact Information for Donor (*required information)

*First Name

*Last Name

*Street Address (Including PO Box, if applicable)

*City

*Province

*Postal Code

*Preferred Daytime Phone Number

Email Address

- Please direct my gift to the Dundas Manor Redevelopment Fund – For a new and vibrant Dundas Manor Long-Term Care Home.**

Donor initial _____

To:

Brokerage Firm Name (and FINS #) *Contact Name

Address City Province Postal Code

Brokerage Firm Contact Name Telephone Number & Extension

Brokerage Firm Contact Email Address

Re:

Donor(s) Name(s) Account #

Address of Donor(s) City Province Postal Code

I empower you, my broker, to make free delivery of the following mutual funds from my account electronically, for deposit as a donation-in-kind to the WDMH Foundation
(Charitable Registration # 89282 4368 RR0001), to:

Account # 504-02397-16
Dealer Code 9190-E75

Number of Units	Mutual Fund Name (including Full Fund Code)
_____	_____
_____	_____
_____	_____
_____	_____

You, my/our broker, are further directed to execute this transfer immediately upon receipt of this notice. To acknowledge receipt of this instruction, immediately fax a signed copy of this form to RBC Dominion Securities at 613-345-7707 or send by e-mail PDF to kathy.hunt@rbc.com.

_____	Name (please print)	Signature of Donor
_____	Name (please print)	Signature of Donor

I acknowledge receipt of this direction to transfer mutual funds.

_____	Firm Signature	Date
Donor's Brokerage		